

State of Maine
Master Score Sheet

RFP# 202309194				
School Construction Planning Documents Revision				
Bidder Name:		Harriman	Oak Point	CHA
Proposed Cost:		\$99,000	\$198,750	\$145,000
Scoring Sections	Points Available			
Section I: Preliminary Information	P/F	P	P	P
Section II: Organization Qualifications and Experience	45	38	30	40
Section III: Proposed Services	30	26	20	28
Section IV: Cost Proposal	25	25	12	17
TOTAL	<u>100</u>	<u>89</u>	<u>62</u>	<u>85</u>

Award Justification Statement

RFP# 202309194 – School Construction Planning Documents Revision

I. Summary

The Department of Education sought proposals for services to support the Office of School Facilities in the revision of three school construction planning documents.

II. Evaluation Process

Each section of the proposals was broken down into sub-categories and provided with sublevel scores, as follows:

Qualifications & Experience: 45 points

Proposed Services: 30 points

Cost Proposal: 25 points

Each bidder started with 0 points.

Points were awarded for each bidder by consensus during the evaluation discussions for Qualifications & Experience and Proposed Services. Points were calculated based on a mathematical formula for the Cost Proposal. Points were then totaled for each of the bidders.

III. Qualifications & Experience

The successful bidder had a long and ambitious history of developing and applying expertise related to architectural and construction processes to new facilities and additions within Maine's public schools and had professional in-house graphic designers available to work on the documents.

IV. Proposed Services

The successful bidder provided a relevant proposal that incorporated community input and DOE compliance standards for school construction.

V. Cost Proposal

The cost proposal is based on the bidder's proposed services fee. Harriman's proposal was the highest score.

- a. Harriman: \$99,000

VI. Conclusion

Although all bidders presented adequate qualifications and proposed services, the extensive experience and thoughtful incorporation of various stakeholders in their proposed services made Harriman's proposal stand out as the best candidate for the services on this project.



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

December 28, 2023

Mark Lee
Harriman
46 Harriman Drive
Auburn, ME 04210

**SUBJECT: Notice of Conditional Contract Award under RFP #202309194
School Construction Planning Documents Revision**

Dear Mark Lee:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for School Construction Planning Documents Revision. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- Harriman

The bidder listed above received the evaluation team's highest ranking. The Department will be contacting the aforementioned bidder soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice does NOT constitute the formation of a contract between the Department and the apparent successful vendor. The vendor shall not acquire any legal or equitable rights relative to the contract services until a contract containing terms and conditions acceptable to the Department is executed. The Department further reserves the right to cancel this Notice of Conditional Contract Award at any time prior to the execution of a written contract.

As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract. A Statement of Appeal Rights has been provided with this letter; see below.

Thank you for your interest in doing business with the State of Maine.

Sincerely,

Nathan W. McIvor
Office Administrator
Office of School Facilities
Maine Department of Education

Nathan W. McIvor

12/28/2023

STATEMENT OF APPEAL RIGHTS

Any person aggrieved by an award decision may request an appeal hearing. The request must be made to the Director of the Bureau of General Services, in writing, within 15 days of notification of the contract award as provided in 5 M.R.S. § 1825-E (2) and the Rules of the Department of Administrative and Financial Services, Bureau of General Services, Division of Purchases, Chapter 120, § (2) (2).



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

December 28, 2023

Norm Lemire
Oak Point Associates
231 Main St Biddeford, ME 04005

**SUBJECT: Notice of Conditional Contract Award under RFP #202309194
School Construction Planning Documents Revision**

Dear Norm Lemire:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for School Construction Planning Documents Revision. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- Harriman

The bidder listed above received the evaluation team's highest ranking. The Department will be contacting the aforementioned bidder soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice does NOT constitute the formation of a contract between the Department and the apparent successful vendor. The vendor shall not acquire any legal or equitable rights relative to the contract services until a contract containing terms and conditions acceptable to the Department is executed. The Department further reserves the right to cancel this Notice of Conditional Contract Award at any time prior to the execution of a written contract.

As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract. A Statement of Appeal Rights has been provided with this letter; see below.

Thank you for your interest in doing business with the State of Maine.

Sincerely,

Nathan W. McIvor
Office Administrator
Office of School Facilities
Maine Department of Education

Nathan W. McIvor

12/28/2023

STATEMENT OF APPEAL RIGHTS

Any person aggrieved by an award decision may request an appeal hearing. The request must be made to the Director of the Bureau of General Services, in writing, within 15 days of notification of the contract award as provided in 5 M.R.S. § 1825-E (2) and the Rules of the Department of Administrative and Financial Services, Bureau of General Services, Division of Purchases, Chapter 120, § (2) (2).



**STATE OF MAINE
DEPARTMENT OF EDUCATION**

**Janet T. Mills
Governor**

**Pender Makin
Commissioner**

December 28, 2023

Kathy Cogan
CHA Architecture
49 Dartmouth St
Portland, ME 04101

**SUBJECT: Notice of Conditional Contract Award under RFP #202309194
School Construction Planning Documents Revision**

Dear Kathy Cogan:

This letter is in regard to the subject Request for Proposals (RFP), issued by the State of Maine Department of Education for School Construction Planning Documents Revision. The Department has evaluated the proposals received using the evaluation criteria identified in the RFP, and the Department is hereby announcing its conditional contract award to the following bidder:

- Harriman

The bidder listed above received the evaluation team's highest ranking. The Department will be contacting the aforementioned bidder soon to negotiate a contract. As provided in the RFP, the Notice of Conditional Contract Award is subject to execution of a written contract and, as a result, this Notice does NOT constitute the formation of a contract between the Department and the apparent successful vendor. The vendor shall not acquire any legal or equitable rights relative to the contract services until a contract containing terms and conditions acceptable to the Department is executed. The Department further reserves the right to cancel this Notice of Conditional Contract Award at any time prior to the execution of a written contract.

As stated in the RFP, following announcement of this award decision, all submissions in response to the RFP are considered public records available for public inspection pursuant to the State of Maine Freedom of Access Act (FOAA). 1 M.R.S. §§ 401 et seq.; 5 M.R.S. § 1825-B (6).

This award decision is conditioned upon final approval by the State Procurement Review Committee and the successful negotiation of a contract. A Statement of Appeal Rights has been provided with this letter; see below.

Thank you for your interest in doing business with the State of Maine.

Sincerely,

Nathan W. McIvor
Office Administrator
Office of School Facilities
Maine Department of Education

Nathan W. McIvor

12/28/2023

STATEMENT OF APPEAL RIGHTS

Any person aggrieved by an award decision may request an appeal hearing. The request must be made to the Director of the Bureau of General Services, in writing, within 15 days of notification of the contract award as provided in 5 M.R.S. § 1825-E (2) and the Rules of the Department of Administrative and Financial Services, Bureau of General Services, Division of Purchases, Chapter 120, § (2) (2).

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revision

BIDDER: Harriman

DATE: 11/14/2023

SUMMARY PAGE

Department Name: Education

Name of RFP Coordinator: Nathan McIvor

Names of Evaluators: Ruey Yehle, Ted Hall, Valerie Chiang, F. David Lewis

<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Preliminary Information	P/F	P
Section II. Organization Qualifications and Experience	45	38
Section III. Proposed Services	30	26
Section IV. Cost Proposal	25	25
<u>Total Points</u>	<u>100</u>	<u>89</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revision

BIDDER: Harriman

DATE: 11/14/2023

**EVALUATION OF SECTION I
Preliminary Information**

	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Preliminary Information	P/F	P

The necessary documentation required by the RFP for eligibility was included in the application.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revision

BIDDER: Harriman

DATE: 11/14/2023

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	45	38

Evaluation Team Comments:

The bidder chose specialty subcontractors for this project, and it is not clear how pertinent these individuals will be throughout the *entire* revision process.

Decades of school design experience – including ambitious projects that required much expertise, including document preparation skills that include graphic designers who would be involved with this project as well.

Met all licensure/certification requirements.

Certification for insurance

No litigation in the last 5 years.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revision

BIDDER: Harriman

DATE: 11/14/2023

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	30	26

Evaluation Team Comments:

The bidder acknowledged that all standards for these documents will comply with DOE's internal guidelines and not internal preferences at the firm.

The bidder plans to incorporate community involvement by providing SAUs with methods to collect information from local areas.

The provided timeline is detailed enough to extend past the initial period of performance in this RFP.

The workplan, though sufficient, would have benefited from slightly more detail in other areas.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revision

BIDDER: Harriman

DATE: 11/14/2023

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	/	Cost Proposal Being Scored	x	Score Weight	=	Score
\$99,000	/	\$99,000	x	25 points	=	25

Evaluation Team Comments:

No comments.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revision

BIDDER: Oak Point

DATE: 11/14/2023

SUMMARY PAGE

Department Name: Education

Name of RFP Coordinator: Nathan McIvor

Names of Evaluators: Ruey Yehle, Ted Hall, Valerie Chiang, F. David Lewis

<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Preliminary Information	P/F	P
Section II. Organization Qualifications and Experience	45	30
Section III. Proposed Services	30	20
Section IV. Cost Proposal	25	12
<u>Total Points</u>	<u>100</u>	<u>62</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revision

BIDDER: Oak Point

DATE: 11/14/2023

**EVALUATION OF SECTION I
Preliminary Information**

	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Preliminary Information	P/F	P

The necessary documentation required by the RFP for eligibility was included in the application.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revision

BIDDER: Oak Point

DATE: 11/14/2023

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	45	30

Evaluation Team Comments:

Familiar with school construction in Maine through previous experience.

No dates for required details of last three school construction projects.

Insurance and liability certification

2 of 3 individuals mentioned have been identified as subcontractors.

Licensure and certification information for 4/11 of the Oak Point staff and 2/3 of the subcontractors.

No litigation within the last 5 years.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revision

BIDDER: Oak Point

DATE: 11/14/2023

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	30	20

Evaluation Team Comments:

Timeline usefully shows how different aspects of the project would occur concurrently.

The plan has Oak Point staff directing the parameters of the project and presenting to DOE later--which could cause delays for correction.

Bidder wants to use local and known resources in Maine for this project.

Language is broad with few specific initiatives.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revision

BIDDER: Oak Point

DATE: 11/14/2023

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	/	Cost Proposal Being Scored	x	Score Weight	=	Score
\$99,000	/	\$198,750	x	25 points	=	12

Evaluation Team Comments:

No comments.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revision

BIDDER: CHA

DATE: 11/14/2023

SUMMARY PAGE

Department Name: Education

Name of RFP Coordinator: Nathan McIvor

Names of Evaluators: Ruey Yehle, Ted Hall, Valerie Chiang, F. David Lewis

<u>Scoring Sections</u>	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Preliminary Information	P/F	P
Section II. Organization Qualifications and Experience	45	40
Section III. Proposed Services	30	28
Section IV. Cost Proposal	25	17
<u>Total Points</u>	<u>100</u>	<u>85</u>

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revision

BIDDER: CHA

DATE: 11/14/2023

**EVALUATION OF SECTION I
Preliminary Information**

	<u>Points Available</u>	<u>Points Awarded</u>
Section I. Preliminary Information	P/F	P

The necessary documentation required by the RFP for eligibility was included in the application.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revision

BIDDER: CHA

DATE: 11/14/2023

**EVALUATION OF SECTION II
Organization Qualifications and Experience**

	<u>Points Available</u>	<u>Points Awarded</u>
Section II. Organization Qualifications and Experience	45	40

Evaluation Team Comments:

Experience with other preK-12 school projects-familiar with DOE processes.

Firm provides cost estimation services, which could be useful for valuation of materials, systems relevant to new to planning documents.

Detailed individual staff skills/qualifications – useful and exceeds minimum board chart requirement. Chief architect specializes in hospitals, not schools. All staff have proper licensure, certification, and professional memberships.

Requirements met for insurance/liability certification.

Civil litigation – claims have been filed against this firm, but no judgements have found it at fault; it is normal for a large firm to have a history of at least a few civil suits given its regular involvement in frequent large-scale projects.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revision

BIDDER: CHA

DATE: 11/14/2023

**EVALUATION OF SECTION III
Proposed Services**

	<u>Points Available</u>	<u>Points Awarded</u>
Section III. Proposed Services	30	28

Evaluation Team Comments:

Very thorough work plan with detailed timeline that demonstrates expertise and could make for increased efficiency.

Extra benefit of maintaining and sharing notes and real-time feedback to DOE through accessible software and Excel templates.

**STATE OF MAINE
TEAM CONSENSUS EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revision

BIDDER: CHA

DATE: 11/14/2023

**EVALUATION OF SECTION IV
Cost Proposal**

Lowest Submitted Cost Proposal	/	Cost Proposal Being Scored	x	Score Weight	=	Score
\$99,000		\$145,000	x	25 points	=	17

Evaluation Team Comments:

No comments

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Harriman

DATE: 11.12.23

EVALUATOR NAME: *Ted Hall*

EVALUATOR DEPARTMENT: Education

* **Instructions:** *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

* **Individual Evaluator Comments:**

Preliminary Information (File #1)

1. Proposal Cover Page

2. Debarment, Performance and Non-Collusion Certification

Provided

Organization Qualifications and Experience (File #2)

1. Overview of the Organization

a. Qualifications and Experience Form) describing their qualifications and skills to provide the requested services in the RFP.

-Talks about the deliverables being easy to navigate, visually engaging, and clearly organized.

-Mentions New Vista Design as a partner

-Emily Waugh as leading the document preparation

-Provides mission and profile about the company

-Gives history of company's projects

b. Bidders must include three examples of projects which demonstrate their experience and expertise in performing these services as well as highlighting the Bidder's stated qualifications and skills.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Harriman

DATE: 11.13.2023

EVALUATOR NAME: *Ted Hall*

EVALUATOR DEPARTMENT: Education

-Projects identified include:

- ELHS—just opened
- RSU-10—not built yet but soon to be started
- Sanford PreK-8 schools restructuring project

2. Subcontractors: names, contact information, organizational capacity, and qualifications.

-David Stephen, New Vista Design—lots of information about his work

-TJM consulting on food service

3. Organizational Chart that includes this project with positions identified by title and job descriptions

-Has an org chart for this project, showing 7 in-house and 2 subs

4. Litigation *NONE*

5. Licensure/Certification *Provided*

6. Certificate of Insurance *Provided*

Section III Proposed Services

1. Services to be Provided

Scope of Services

Ed Specs—mentions looking at other states first. Also will engage with those in the field, reviewed by DOE team (sounds like later in the process)

Space Allocation—similar process. Includes visiting constructed schools. Mentions DOE team earlier in this process

Public school standards & guidelines—starts with DOE team. Gathers information from contractors and design professionals. Look at Energy & Sustainability, Safety and

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Harriman

DATE: 11.13.2023

EVALUATOR NAME: *Ted Hall*

EVALUATOR DEPARTMENT: Education

Security, Site and Athletic Facility Design, Exterior and Interior Materials and Systems. Will present options to DOE.

2. Implementation - Work Plan, including timeline

Provided both a work plan and a separate timeline with tasks described above.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Harriman

DATE: 11/13/2023

EVALUATOR NAME: F. David Lewis

EVALUATOR DEPARTMENT: Education (external vendor/independent contractor)

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Directions: *Follow the sections of your RFP to develop a bulleted outline for notes. Delete the sample below and these directions and replace with your own outline based on your RFP. Please do not type in any font color other than black*

Preliminary Information:

- The cover page and Debarment, Performance, and Non-Collusion Certification are completed.

Org Qualifications:

- The applicant included a detailed description of their experience and qualifications.
- They are a New England-based A/E firm with an extensive history.
- The three projects submitted illustrate recent experience designing schools in Maine:
 - Edward Little High School.
 - RSU-10 Feasibility and Planning Study and Conceptual Design.
 - Sanford School Department, PreK-8 Schools Restructuring Project
- No additional projects are mentioned in the proposal.
- Subcontractors for educational design and food service design are included, with several specific projects listed for the educational design consultant.
- An Organizational Chart is included.
- They state that they have no current or closed litigation within the past 5 years.
- Licensure/Certifications are listed for key personnel.
- Acord Certificates of Insurance are included.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Harriman

DATE: 11/13/2023

EVALUATOR NAME: *F. David Lewis*

EVALUATOR DEPARTMENT: Education (external vendor/independent contractor)

Proposed Services:

- The applicant's approach and proposed services are listed by the specific document to be revised (Educational Specifications, Space Allocations Guidelines, and Public School Standards & Guidelines) and include a general description of the process for evaluating and updating each document.
- They stress that the result should be the product of DOE's standards and goals, not those of the specific consultant.
- A detailed work plan with task descriptions and resultant deliverables is included.
- A week-by-week schedule is included and illustrates that the work on each guideline will be in a sequential order.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Harriman

DATE: Nov 12 and 13, 2023

EVALUATOR NAME: Ruey B. Yehle

EVALUATOR DEPARTMENT: Education

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Directions: *Follow the sections of your RFP to develop a bulleted outline for notes. Delete the sample below and these directions and replace with your own outline based on your RFP. Please do not type in any font color other than black*

Preliminary Information:

1. Proposal Cover Page:

This required page was filled in, signed, and dated. Pass

2. Debarment, Performance, and non-Collusion Certification:

This required page was signed and dated. Pass

3. Eligibility Requirements:

The bidder has licensed architects , engineers, and individuals who are familiar with public school construction and the processes involved.

Organization Qualifications and Experience:

1. Overview of the Organization:

Harriman described their organization as an integrated design firm of architects and engineers with extensive experience in school planning and design. Experience includes building and site organization to building material selection, life cycle analysis, energy modeling, sustainability, safety and security, and post occupancy evaluation. An Educational Facility Planning Coordinator will lead the assembly of the reporting for both print and electronic formats. This organization began in 1870 and has evolved over time from Lewiston Maine to four offices in three states. Harriman provided three

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Harriman

DATE: Nov 12 and 13, 2023

EVALUATOR NAME: Ruey B. Yehle

EVALUATOR DEPARTMENT: Education

examples of recent projects : Edward Little High School new building, RSU #10 PK – 8 new building, and Sanford PK – 8 restructuring project.

2. Subcontractors

Two subcontractors were identified.

- a. New Vista Overview – an individual educational and architectural consulting firm who works with districts and A & E firms in several states with an emphasis on future ready learning and environments, career tech curriculum, and community engagement in projects/visioning. A number of listing was provided, all ending in 2018.
- b. TJM Consulting, Inc. – An individual who consults on the design of “commercial” and school kitchens.

3. Organizational Chart:

Harriman provided an organizational chart with Mark Lee as the Principal-in Charge and Lisa Sawin as the Educational Design Principal with an additional 5 Harriman employees offering expertise as the educational facility planning, electrical engineering, civil engineering, mechanical engineering, and structural engineering. The consultants have areas of expertise as noted above.

4. Litigation:

Harriman states that there is no current outstanding judgement, claims, or arbitration proceedings or suits in the past five years.

5. Licensure/Certification:

Harriman provided the Maine License numbers for 6 of the individuals – 2 licenced architects, a mechanical engineer, an electrical engineer, a structural engineer, and a civil engineer.

6. Certificate of Insurance:

Two ACORD certificates of insurance were provided.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Harriman

DATE: ***Nov 12 and 13, 2023***

EVALUATOR NAME: **Ruey B. Yehle**

EVALUATOR DEPARTMENT: Education

Proposed Services:

1. Services to be Provided:

Harriman provided a paragraph regarding each of the 3 documents.

Educational Specifications The review will begin with a comprehensive review of the existing questions and compare those to Ed Specs written by districts in other state. A focus will be on examining topics that could reinforce DOE school construction guidelines more directly. Will review and suggest method that a district can use the document to engage the community to help with the development of their Ed Spec. Also will work with a Maine School District on this same topic. Will result in draft Ed Spec document presented to MDOE – SFT.

Space Allocation Guidelines Similar process to above. Will evaluated current space standards against current actual space in recent projects and other state's space standards. Will tour other schools. Will have a series of meetings with MDOE – SFT to develop the draft guidelines.

Public School Standards and Guidelines We initially with benchmark the current document with recently constructed projects in state and elsewhere. Will consider life cycle cost implications, health impacts of various materials, systems, and design features. First meeting with MDOE – SFT to define areas of focus. Will have a series of meetings with contractors and design professionals to review current guidelines, trends in school construction, and document best practices across multiple stakeholders. Then will review proposed changes in Energy and Sustainability, Safety and Security, Site and Athletic Facility Design, Exterior and Interior Materials and Systems and will present data to MDOE – SFT.

2. Implementation – Work Plan

Harriman provided a spreadsheet with the order of tasks, description of each task and the expected deliverables for each of the three documents. Additionally they provided a timeline of a 40 week project schedule or an approximate 10 month schedule, ending around August/September

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Harriman

DATE: November 13, 2023

EVALUATOR NAME: Valerie Chiang

EVALUATOR DEPARTMENT: Education

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is required that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Directions: *Follow the sections of your RFP to develop a bulleted outline for notes. Delete the sample below and these directions and replace with your own outline based on your RFP. Please do not type in any font color other than black*

Preliminary Information:

- Requested information provided

Org Qualifications:

- Fully integrated design firm of architecture, engineering, planning, and interior design, and has school planning & design experience
- David Stephen, New Vista Design – educational consultant & architect sub
- TJM Consulting – food service design sub
- Graphic designers and Educational Facility Planning Coordinator will lead assembly of reporting in both print & electronic formats
- Auburn ELHS, RSU 10 PreK-8, Sanford PreK-8 Schools Restructuring
- Organizational chart provided, educational facility planning, electrical engineering, civil engineering, mechanical engineering, structural engineering all in-house
- Litigation – none listed
- Licensure/Certification – all team members with licenses listed
- Certificate of Insurance provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Harriman

DATE: November 13, 2023

EVALUATOR NAME: Valerie Chiang

EVALUATOR DEPARTMENT: Education

Proposed Services:

- Ed Specs – comprehensive review of questions and outcomes, compare with other states, examine topics that reinforce Guidelines more directly, review & suggest methods engaging community, workshop w/ a Maine school district
- Space Allocation – evaluate current standards for Maine and other states, tour constructed schools for effectiveness and areas to consider changes, facilitate discussion
- Standards & Guidelines – benchmark current document with recently constructed projects & others, life cycle cost implications, educational & health impacts of materials, systems, design features, define areas of focus, series of info gathering from contractors and design professionals, document best practices, review proposed changes. Topics include energy & sustainability, safety & security, site and athletic facility design, exterior and interior materials & systems
- Work plan provides detailed list of tasks per section, meeting topics, and deliverables, presented with a timeline
- Unclear what format deliverables will be provided to DOE

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Oak Point Associates

DATE: November 13, 2023

EVALUATOR NAME: Valerie Chiang

EVALUATOR DEPARTMENT: Education

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Directions: *Follow the sections of your RFP to develop a bulleted outline for notes. Delete the sample below and these directions and replace with your own outline based on your RFP. Please do not type in any font color other than black*

Preliminary Information:

- Requested information provided

Org Qualifications:

- Full range of disciplines – landscape architecture, architecture, engineering, and interior design
- K-12 studio last 20+ years
- Portland Public Schools PreK-5, RSU 19 Newport ES, MS/HS, RSU 2 Monmouth PK-8
- Good Harbor Techmark – security design & engineering sub
- New Vista Design – educational planner sub
- Organizational chart provided, architecture, landscape architecture, interior design, civil engineering, structural engineering, fire protection, mechanical engineering, electrical engineering all in-house
- Litigation – none listed
- Licensure/Certification – architect licenses listed, PE's identified on work chart without license listing, other certifications listed
- Certificate of Insurance provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Oak Point Associates

DATE: November 13, 2023

EVALUATOR NAME: Valerie Chiang

EVALUATOR DEPARTMENT: Education

Proposed Services:

- Ed Specs – review document, 2 meetings, workshop, Fed & State requirements / best practices, draft & final document. Educational consultant to participate in document review (internal), workshop at DOE w/educators and other school administrators
- Space Allocation – review document, 3 meetings, workshop, GC workshop, Fed & State requirements / best practices, draft & final document. Recent school construction projects, workshop w/school district personnel, analyze existing conditions, space & program evolution
- Standards & Guidelines – review document, 4 meetings, Designer workshop, GC workshop, Fed & State requirements / best practices, draft & final document. Security consultant to participate in document review (internal), workshop w/design professionals to review energy efficiency, sustainability, safety, security, site planning, building envelope, finishes, furnishings, equipment, HVAC, plumbing, electrical, technology. Workshop w/ GC's.
- Work plan provides detailed list of tasks per section, who, and integrates timeline
- Unclear what format deliverables will be provided to DOE

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Oak Point Associates

DATE: Nov 12 and 13, 2023

EVALUATOR NAME: Ruey B. Yehle

EVALUATOR DEPARTMENT: Education

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Directions: *Follow the sections of your RFP to develop a bulleted outline for notes. Delete the sample below and these directions and replace with your own outline based on your RFP. Please do not type in any font color other than black*

Preliminary Information:

1. Proposal Cover Page:

The required page is filled in, signed, and dated. Pass

2. Debarment, Performance, and non-Collusion Certification:

The required page is signed and dated. Pass

3. Eligibility Requirements:

Oak Point includes licensed architect, civil engineer, structural engineer, mechanical engineer, electrical engineer, and various individuals with related certificates.

Organization Qualifications and Experience:

1. Overview of the Organization:

Oak Point is a design studio-based practice with a "full-range of disciplines" – landscape architecture, architecture, engineering, and interior design set up to work in teams focused on cross-discipline collaboration. It has been in business for twenty plus years. A big focus of projects is providing an extensive community engagement process. Three projects were highlighted: Portland PK – 5 Elementary School – new

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Oak Point Associates

DATE: Nov 12 and 13, 2023

EVALUATOR NAME: Ruey B. Yehle

EVALUATOR DEPARTMENT: Education

construction, New grades 6 – 12 Middle School/High School and middle school repurposed into elementary schools and RSU #2 new PK – 8 school.

2. Subcontractors

Two Subcontractors were identified:

- a. Good Harbor Techmark, LLC: specializes in security design and engineering services.
- b. New Vista Design: Consulting firm across the US to “facilitate the design of forward thinking, dynamic, and technology-rich school programs and facilities that house them.”
- c. Frank Gallagher, security expert – don’t see a write-up

3. Organizational Chart:

An organizational chart was provided which indicates Rob Tillotson will be the Principal-in-Charge.

4. Litigation:

Oak Point has not been involved in any current or closed litigation in the past five years.

5. Licensure/Certification:

Licensure/certification was noted for 4 of the 11 Oak Point participants and 2 of the 3 subcontractors.

6. Certificate of Insurance:

An ACORD certificate of insurance was provided.

Proposed Services:

1. Services to be Provided:

An overview was provided, then more details about each of the three documents. Educational Specifications The Educational Consultant will be utilized during the document review phase. A conversation will take place with MDOE – SFT regarding the Oak Point internal ed spec discussion and will prompt an initial revision to the document. A workshop with school personnel familiar with this document as well as

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Oak Point Associates

DATE: Nov 12 and 13, 2023

EVALUATOR NAME: Ruey B. Yehle

EVALUATOR DEPARTMENT: Education

those who are seeing it for the first time. A draft will be created and presented to MDOE – SFT. MDOE will provide feedback and a second meeting will be held.

Space Allocation Guidelines First a meeting with MDOE – SFT focused on how the document was used in recent projects. Then a workshop for school districts regarding their perception of existing conditions, restraints, how space needs have evolved, and thoughts on flexibility. Meet with MDOE – SFT to create a framework for revisions, then create a draft. MDOE-SFT review and make comments, create final draft.

Public School Standards and Guidelines – Oak Point will include the security consultant during document review and all identified topics will be presented to MDOE- SFT at first meeting. At the same time workshop formats for design professionals and general contractors will be developed. After those workshops Oak Point will meet with MDOE – SFT to discuss all the feedback, then a draft document will be created and presented.

2. Implementation – Work Plan

A work plan time line was proposed of approximately 7 months in length broken down by the three documents and the project ending in June 2024.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Oak Point Associates

DATE: 11.12.23

EVALUATOR NAME: *Ted Hall*

EVALUATOR DEPARTMENT: Education

* **Instructions:** *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

* **Individual Evaluator Comments:**

Preliminary Information (File #1)

1. Proposal Cover Page

2. Debarment, Performance and Non-Collusion Certification

Everything is there.

Organization Qualifications and Experience (File #2)

1. Overview of the Organization

- a. Qualifications and Experience Form) describing their qualifications and skills to provide the requested services in the RFP.**

Brief overview of what they do. 20+ years of working with school depts for school design.

Mentions cross discipline design

- b. Bidders must include three examples of projects which demonstrate their experience and expertise in performing these services as well as highlighting the Bidder's stated qualifications and skills.**

Highlights three projects:

--Portland preK-5 school (not sure of date)—three paragraph description

--RSU-19 project with Nokomis and Newport Elementary, mentions permitting (not sure of date)

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Oak Point Associates

DATE: 11.13.2023

EVALUATOR NAME: *Ted Hall*

EVALUATOR DEPARTMENT: Education

--RSU-2 school for pre-K -5

- 2. Subcontractors: names, contact information, organizational capacity, and qualifications.**

Mentions two subs—one with security experience and the other with technology experience

- 3. Organizational Chart that includes this project with positions identified by title and job descriptions**

Does NOT include this project—only the current org chart

- 4. Litigation** *None*

- 5. Licensure/Certification** *Provided*

- 6. Certificate of Insurance** *Provided*

Proposed Services

- 1. Services to be Provided**

Scope of Services outlined in a few paragraphs for each part of the project, relying on input from DOE team. Straightforward in the approach

- 2. Implementation - Work Plan, including timeline**

Put the paragraphs described above into a timeline

Wonder about who they will get input from before finalizing drafts—will they bring people in from schools involved to get their input?

Cost Proposal

Lump Sum Fee of \$198,750 with attached hourly amounts, but no estimate of how many hours from each

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Oak Point Associates

DATE: 11/13/2023

EVALUATOR NAME: F. David Lewis

EVALUATOR DEPARTMENT: Education

Instructions: *The purpose of this form is to record proposal review notes written by individual evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Directions: *Follow the sections of your RFP to develop a bulleted outline for notes. Delete the sample below and these directions and replace with your own outline based on your RFP. Please do not type in any font color other than black*

Preliminary Information:

- The cover page and Debarment, Performance and Non-Collusion Certification are completed.

Org Qualifications:

- The applicant included a brief, general description of their experience and qualifications.
- They are a full-service A/E firm with K-12 experience in Maine.
- The three projects submitted illustrate recent experience designing schools in Maine:
 - Hall School
 - RSU-19
 - RSU-2
- No additional projects are mentioned in the proposal.
- Subcontractors for educational design and facilities security design are included, but no specific projects are listed for either subcontractor.
- An Organizational Chart is included.
- Licensure/Certifications are listed for key personnel.
- They have no current or closed litigation within the past 5 years.
- An Acord Certificate of Insurance is included.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: Oak Point Associates

DATE: 11/13/2023

EVALUATOR NAME: *F. David Lewis*

EVALUATOR DEPARTMENT: Education

Proposed Services:

- The applicant's proposed services are broken out by the specific document (Educational Specifications, Space Allocations Guidelines, and Public School Standards & Guidelines) and include a general description of the process for evaluating and updating each document. The defined steps include review of the existing document, meetings with relevant stakeholders (DOE, Contractors, etc.), preparation of drafts and completion.
- A work plan/schedule with task descriptions is included, and the proposed schedule is broken out by month for the duration noted in the RFP.
- The schedule for each document is presented individually and shows that work on each guideline will be concurrent.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: CHA Architecture

DATE: 11/13/2023

EVALUATOR NAME: F. David Lewis

EVALUATOR DEPARTMENT: Education (external vendor/independent contractor)

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Directions: *Follow the sections of your RFP to develop a bulleted outline for notes. Delete the sample below and these directions and replace with your own outline based on your RFP. Please do not type in any font color other than black*

Preliminary Information:

- The cover page and Debarment, Performance, and Non-Collusion Certification are completed.

Org Qualifications:

- The applicant included a detailed description of their experience and qualifications.
 - They are part of a full-service national engineering firm, with a Maine-based PreK-12 design studio.
- The three projects submitted illustrate recent experience designing schools in Maine:
 - Mt. Ararat High School
 - Kate Furbish Elementary School
 - Caribou Community School
- Numerous additional PreK-12 projects in Maine are listed.
- Subcontractors for MEP/Structural Engineering, Civil Engineering, and Energy Modeling are listed. Specific projects are listed for only MEP/Structural.
- An Organizational Chart is included.
- Professional resumes for key personnel are included.
- They note that they have had claims over the past 5 years described as "ordinary civil litigation." No specifics are offered.
- Licensure/Certifications are listed for key personnel on the included resumes.
- An Acord Certificate of Insurance is included.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents **BIDDER NAME:** CHA
Architecture

DATE: 11/13/2023

EVALUATOR NAME: *F. David Lewis*

EVALUATOR DEPARTMENT: Education (external vendor/independent contractor)

Proposed Services:

- The applicant's approach and proposed services are listed by the specific document to be revised and include a detailed description of the process for evaluating and updating each document.
 - They note that they were involved in the development of the current version of the Standards & Guidelines document.
- A detailed work plan with goals, task descriptions, and responsibilities is included.
- A detailed week-by-week schedule is included and illustrates that the work on each guideline will be in sequential order after an initial kickoff meeting.
- Target deadline dates are identified for each task.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: CHA Architecture

DATE: 11.13.2023

EVALUATOR NAME: *Ted Hall*

EVALUATOR DEPARTMENT: Education

* **Instructions:** *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

* **Individual Evaluator Comments:**

Preliminary Information (File #1)

1. Proposal Cover Page Provided

2. Debarment, Performance and Non-Collusion Certification Provided

Organization Qualifications and Experience (File #2)

1. Overview of the Organization

a. Qualifications and Experience Form) describing their qualifications and skills to provide the requested services in the RFP.

Overview of organization

"We design for student success"

6 visuals outlining some of their key principles

16 Elementary, 6 Middle Schools, 14 high schools—dates are not given but many of them are quite a long time ago

b. Bidders must include three examples of projects which demonstrate their experience and expertise in performing these services as well as highlighting the Bidder's stated qualifications and skills.

Long list provided

Highlighted:

Mt Ararat HS 2021 including several pictures of the school

Kate Furbish Elementary 2020, PreK-2 including pictures as well

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: CHA Architecture

DATE: 11.13.2023

EVALUATOR NAME: *Ted Hall*

EVALUATOR DEPARTMENT: Education

Caribou Community School 2021, partnership with NPS, town, etc. Park nearby to school that is in the center of town

2. Subcontractors: names, contact information, organizational capacity, and qualifications.

Allied Engineers—MEP and Structural Engineering

Gorrill Palmer – Civil Engineering

Thornton Tomasetti—Energy Modeling

3. Organizational Chart that includes this project with positions identified by title and job descriptions

Provided chart with 8 CHA staff and three consultants. Gives more information about staff from CHA including projects they have been involved in

4. Litigation *Provided information, including that they do have some litigation within last 5 years. Big company with 50 offices across US and Canada*

5. Licensure/Certification *Provided in bios of staff involved*

6. Certificate of Insurance *Provided*

Proposed Services

1. Services to be Provided

Scope of Services—assisted last time around. Suggested plans include meeting with DOE team first to talk about project and work plan

Ed Spec—suggest involvement of admin who have recently done this work, propose working closely with DOE on this

*Space Allocation—“deep bench” in the organization with help to inform lots of areas
Public School Standard: More depth provided here with examples of how to gather input. Shows example of Caribou school*

2. Implementation - Work Plan, including timeline

Provided work plan that seemed to be many meetings with various inputs from different stakeholders

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: CHA Architecture

DATE: November 13, 2023

EVALUATOR NAME: Valerie Chiang

EVALUATOR DEPARTMENT: Education

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Directions: *Follow the sections of your RFP to develop a bulleted outline for notes. Delete the sample below and these directions and replace with your own outline based on your RFP. Please do not type in any font color other than black*

Preliminary Information:

- Requested information provided

Org Qualifications:

- Architecture, interior design, and planning
- 75+ PreK-12 projects in Maine, included detailed list by grade ranges
- Allied Engineering – MEP & Structural sub
- Gorrill Palmer – Civil Site Engineering sub
- Thornton Tomasetti – Sustainability + Energy Modeling sub
- Mt. Ararat HS (2021), Kate Furbish ES (2020), Caribou Community School (2021)
- Organizational chart provided, 35 architects and interior designers, Building Science + Envelope, Life Safety + Security, Deep Energy Retrofit + Commissioning, Cost Estimating all part of CHA Architecture
- While many of the team members have Maine school experience, resume for the Chief Architect only shows healthcare experience in other states
- Litigation – as a company with over 50 offices, ordinary claims occur. None that will materially affect ability to perform ongoing or future projects
- Licensure/Certification – many Maine-licensed, LEED Accredited, Association for Learning Environments
- Certificate of Insurance provided

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: CHA Architecture

DATE: November 13, 2023

EVALUATOR NAME: Valerie Chiang

EVALUATOR DEPARTMENT: Education

Proposed Services:

- Assisted DOE with last iteration of the Standards and Guidelines
- Meet w/DOE review goals and perceived deficiencies
- Prepare meeting and workshop agendas for each section
- Solicit educators, administrators, A/E, GCs
- Ed Specs – curriculum directors, administrators, other states, prep & organize workshop, notes & mark-ups w/Bluebeam, editable versions in DOE software
- Space Allocation – analyze other states and reflect in-house expertise, prep & organize workshop, notes & mark-ups w/Bluebeam, update Excel templates, Mentimeter
- Standards & Guidelines – ID DOE goals, initial commentary & recommendations, facilitate meetings & workshops, cost estimating, high performance principles, school safety & security, site planning, building exterior envelope, interiors, HVAC, plumbing, electrical, data technology, codes and references, energy efficiency & sustainability workshop, GC workshop, virtual survey, notes & mark-ups w/Bluebeam
- Work Plan is very descriptive, including how meeting is conducted, who, topics, action items, and responsibilities within a timeline

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: CHA Architecture

DATE: November 12, 2023

EVALUATOR NAME: Ruey B. Yehle

EVALUATOR DEPARTMENT: Education

Instructions: *The purpose of this form is to record proposal review notes written by **individual** evaluators for this Request for Proposals (RFP) process. It is **required** that each individual evaluator make notes for each proposal that he or she reviews. No numerical scoring should take place on these notes, as that is performed only during team consensus evaluation meetings. A separate form is available for team consensus evaluation notes and scoring. Once complete, please submit a copy of this document to your Department's RFP Coordinator or Lead Evaluator for this RFP.*

Individual Evaluator Comments:

Directions: *Follow the sections of your RFP to develop a bulleted outline for notes. Delete the sample below and these directions and replace with your own outline based on your RFP. Please do not type in any font color other than black*

Preliminary Information:

1. Proposal Cover Page:

This required page was filled in, signed and dated. - Pass

2. Debarment, Performance, and non-Collusion Certification:

This required page for signed and dated. - Pass

3. Eligibility Requirements:

The bidder has licensed architects, engineers, and individuals who are familiar with public school construction and the processes involved.

Organization Qualifications and Experience:

1. Overview of the Organization:

Nine years ago CHA participated in a similar review and revision of the three Maine documents: Educational Specifications, Space Allocation Guidelines, and Standards and Guidelines for New School Construction and Major Renovation Projects. CHA Architecture is aligned with CHA Consulting, Inc which includes more than 1,700 technical professionals in the US and Canada. CHA Architecture has been in 75+ PK –

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: CHA Architecture

DATE: November 12, 2023

EVALUATOR NAME: Ruey B. Yehle

EVALUATOR DEPARTMENT: Education

12 projects in Maine. In addition to a list of 16 elementary schools, 6 middle schools and 14 high schools and provided detailed overviews of three recent projects: Mt. Ararat HS (2021), Kate Furbish Elementary School (2020) and Caribou Community School (2021). Kathy Cogan has been identified as the Project Manager for this RFP.

2. Subcontractors

- a. Allied Engineers – MEP and Structural Engineering – established in 1958. Recent educational projects were listed.
- b. Gorrill Palmer – Civil Site Engineering – established in 1998. Indicated that they provide a full scope of services to public and private sectors including schools.
- c. Thornton Tomasetti – Energy Modeling – “brings more than 30 years experience” in providing sustainability and energy modeling services for more than 100 projects for public and private K – 12 campuses.

3. Organizational Chart:

An organizational chart was provided with 8 individuals from CHA with backgrounds in Building Science and Envelope, Interiors, Project Architect, LED Green and Life and Safety, Architectural Designer, Deep Energy Retrofit and Commissioning, and Cost Estimating. The three subcontractors were identified as consultants in the areas of Sustainability and Energy Modeling, Civil Site, and Mechanical, Electrical, and Plumbing.

4. Litigation:

No criminal matter, disciplinary sanctions or civil judgements. Claims have occurred on occasion. “CHA has, over the past five years, been involved in ordinary civil litigation in the course of its business.” CHA maintains a comprehensive insurance program.

5. Licensure/Certification:

A description of background and licenses/certificate was provided for each of the 8 CHA individuals and the three subcontractors.

6. Certificate of Insurance:

The ACORD Certificate of insurance was provided in the application.

**STATE OF MAINE
INDIVIDUAL EVALUATION NOTES**

RFP #: 202309194

RFP TITLE: School Construction Planning Documents

BIDDER NAME: CHA Architecture

DATE: November 12, 2023

EVALUATOR NAME: Ruey B. Yehle

EVALUATOR DEPARTMENT: Education

Section III Proposed Services:

1. Services to be Provided:

For the Educational Specifications CHA recommends that curriculum directors and administrators who have successfully completed the effort of writing the Ed Specs for a completed construction project be included in a workshop. CHA will analyze sample Ed Specs from other states and national example projects and provide that information to MDOE – SF. A draft revised document will be provided for comment and feedback prior to final submission.

For the Space Allocation Guidelines CHA will analyze samples from other state, leading research regarding trend in classroom and support spaces. Will help identify the goals of the revisions and assist in creating agendas for subsequent meetings.

For the Public Schools Standards and Guidelines document CHA will meet with the MDOE – SF Team to identify the goals of revisions and desired outcomes of subsequent meetings. Areas of focus will be High Performance Principles, School Safety and Security, Site Planning and Building Exterior Envelope, Interiors, HVAC, Plumbing, Electrical, Data Technology and Codes and References with the CHA cost estimating team providing real time feedback on each subsection.

A chart was provided on organizational priorities, will need clarification about it.

2. Implementation – Work Plan

A Work Plan was provided with action items for each of the meetings, specific dates for meetings and draft completion, suggested attendees for the meetings and a target end date of June 28, 2024, an approximate 7 month time line.



STATE OF MAINE
DEPARTMENT OF EDUCATION

Janet T. Mills
Governor

Pender Makin
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revisions

I, valerie Chiang accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Education. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

Signature

11/9/2023

Date



STATE OF MAINE
DEPARTMENT OF EDUCATION

Janet T. Mills
Governor

Pender Makin
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT

RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revisions

I, Ted Hall accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Education. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

Ted Hall
Signature

11/10/2023
Date



STATE OF MAINE
DEPARTMENT OF EDUCATION

Janet T. Mills
Governor

Pender Makin
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revisions

I, Ruey B. Yehle accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Education. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

Ruey B. Yehle
Signature

11/11/23
Date



STATE OF MAINE
DEPARTMENT OF EDUCATION

Janet T. Mills
Governor

Pender Makin
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT
RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revisions

I, F. David Lewis Architect, LLC accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Education. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

11/13/2023

Signature

Date

RFP COORDINATOR



STATE OF MAINE DEPARTMENT OF EDUCATION

Janet T. Mills
Governor

Pender Makin
Commissioner

AGREEMENT AND DISCLOSURE STATEMENT RFP #: 202309194

RFP TITLE: School Construction Planning Documents Revisions

I, Nathan McIvor accept the offer to become a member of the Request for Proposals (RFP) Evaluation Team for the State of Maine Department of Education. I do hereby accept the terms set forth in this agreement AND hereby disclose any affiliation or relationship I may have in connection with a bidder who has submitted a proposal to this RFP.

Neither I nor any member of my immediate family have a personal or financial interest, direct or indirect, in the bidders whose proposals I will be reviewing. "Interest" may include, but is not limited to: current or former ownership in the bidder's company; current or former Board membership; current or former employment with the bidder; current or former personal contractual relationship with the bidder (example: paid consultant); and/or current or former relationship to a bidder's official which could reasonably be construed to constitute a conflict of interest (personal relationships may be perceived by the public as a potential conflict of interest).

I have not advised, consulted with or assisted any bidder in the preparation of any proposal submitted in response to this RFP nor have I submitted a letter of support or similar endorsement.

I understand and agree that the evaluation process is to be conducted in an impartial manner without bias or prejudice. In this regard, I hereby certify that, to the best of my knowledge, there are no circumstances that would reasonably support a good faith charge of bias. I further understand that in the event a good faith charge of bias is made, it will rest with me to decide whether I should be disqualified from participation in the evaluation process.

I agree to hold confidential all information related to the contents of Requests for Proposals presented during the review process until such time as the Department formally releases the award decision notices for public distribution.

Nathan W. McIvor

11.10.2023

Signature

Date